

‘Using Cases with Undergraduates - Setting the Scene.’

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Dr Scott M. Andrews¹

Should undergraduates be using management case studies as a tool for learning? Early pioneers of the management case study were somewhat unsure:

“Thinking out original answers to new problems or giving new interpretations to old problems is assumed in much undergraduate instruction to be an adult function and, as such, one properly denied to students.” (Gragg, 1940) Harvard

Those original pioneers and scholars of the case method at Harvard looked to their Law School and Medical School for inspiration. For centuries physicians have kept ‘case notes’ which have formed the basis of modern medicine as it is known today (Chase, 1980; Crowe *et al*, 2011). Similarly, in the Western world, legal systems have been formed through the development of what has become known as ‘case law’ (Patterson, 1951). So, it is not surprisingly that Harvard scholars noted these approaches and adapted them for the management case study approach, which has become so popular today. (Corey, 1980; Heath, 2006)

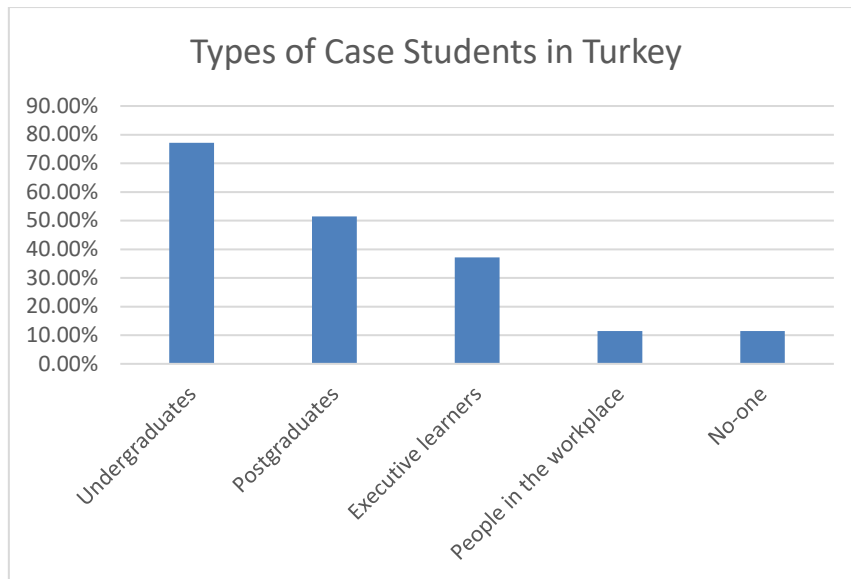
The approach to the case method has subsequently been adopted and adapted in many different ways by practitioners from Business Schools and Management Centres across the world, and today it is fully embedded as part of the professors/tutors/facilitators toolbox for classroom delivery. Once the preserve of the postgraduate or post-experience learner’s classroom, nowadays the case method is equally as popular with undergraduate learners, post experience/executive learners, as well as work-based learners – the case method as initially espoused for graduate learning from Harvard has long since been challenged and adapted (Bridgman *et al*, 2016).

¹ Scott Andrews is the Head of Department for Marketing and Strategy at Worcester Business School, UK. He has written and published cases and for more than 20 years has been delivering case study professional development workshops for the Case Centre.

Subsequently, this raises the question of whether the case can be used in the same manner for undergraduates today or do scholars need to think differently when applying case methodologies for undergraduate use? Even as recently as 20 years ago, there were many Western management centres that were critical of the use of the case method with undergraduates, suggesting that such learners would normally have insufficient world-experience from which to draw to inform their appraisal of issues in the case. The shift towards greater adoption by undergraduate programmes has been enabled in part by technological changes, by creative case formatting, and partly by a change in the philosophical approach to case structuring (Rippin, *et al*, 2002). Traditionally it was held that all the data needed to address the issues in the case could be found in the data contained in the case. In other words, the case was a whole and complete learning package. This learning resource developed in the early half of the 20th Century, ahead of the evolution of online web-based material. Today, the learner is easily able to access massive data searches which can, when managed sensibly, provide significant support to the analysis of the case. For example, if the case is of a known organisation, the student is able to access the organisation's website, company records, articles written about the company and of comparable companies, or organisations facing comparable issues to those of the case context with relative ease. As such, it is no longer viable to assume that students will only use data from the case itself to address the issues in the case.

The evolution of shorter cases and sequential cases also enables bite-sized access to an organisation's data, which makes the learning process more manageable for the less experienced student. The use of online platforms for e-discussions provides an alternative learning context for the undergraduate (Heckman and Annabi, 2005), in contrast to the traditional classroom face-to-face case discussion (Ragan 1996).

The UK-based Case Centre recognizes that there is a growing demand for further training and scholarly research into the use of the case method, to target approaches to different groups of learners. The first 'undergraduate case development' workshop was hosted by the Case Centre in 1999 and these workshops continue to be offered on a frequent basis today to meet the growing global demand for cases training for undergraduate learning (Apaydin, 2008). For example, in a recent survey of over 200 Turkish scholars of the case method in Turkey across different learner groups revealed that its adoption among undergraduate learners is very significant (Andrews, 2016):



Source: CAT Project, Funded by the Erasmus+ Program of the European Union see: www.cat.ba.metu.edu.tr.

However, the use of the case method with different learner groups does present challenges and often leads to a re-thinking of the types of approaches to the classroom discussion. The adoption of the case for the undergraduate student has meant that often younger, less experienced learners are participating in case discussions as part of a much larger class group. It is not unusual to hear of undergraduate case classes that exceed 100 participants, which clearly presents challenges to the tutor in terms of developing genuine engagement and participation within the case journey (Cuseo, 2007). To accommodate larger undergraduate groups there are many important factors to consider which might include:

- The pace of the discussion - not going too fast in case you lose people on the way through confusion, and not going too slow as to create opportunities for student distraction (Andersen and Schiano, 2014).
- The use of break-out/small groups – by inviting larger groups to break into smaller groups of 3-6 members, to address 2-3 questions and then feedback, there is a greater likelihood of all students participating, (Schwenner, 2002)
- The use of role-play and simulation – by breaking the group down to assume different roles (or perspectives) of different characters, which enables greater collaborative participation when feeding back to the larger group, (Shapiro, 1988).
- The use of digital media platforms, Twitter feeds, Facebook groups, mobile voting software, digital simulations, (Wang *et al*, 2011).

The approach adopted to delivering the case sessions should also take into account the developmental level of the learner. For example, executive learners might be very happy to receive a set of cases over a period of time which will be facilitated by a tutor adopting a similar and informal approach to each case, whereas a less experienced undergraduate learner might prefer a more diverse or eclectic mix of experiences formed from different types of cases in different formats, delivered in different styles to maintain interest and motivation.

The level of motivation of the learner will have an impact on the approach that the tutor can take to working with the case data. Often postgraduate and executive learners demonstrate a higher level of motivation, but this does not necessarily mean they are able to provide a greater level of preparation time for the case discussions.

Former Harvard Professor Malcolm McNair was a strong exponent of the case method. Initially trained as a scholar of Shakespeare the professor of retailing became a strong advocate for the function of storytelling as a fundamental component of the case method (Greer, 1985). Storytelling has been widely acknowledged as a powerful learning tool (Fawcett and Fawcett, 2011). Heath (2006) recognizes the narrative structure as one of four key structures that form essential dimensions of effective case study development. Whilst storytelling forms an important part of the narrative structure, it may be worth considering the particular role that it plays in undergraduate case delivery to support and motivate the learner to engage with the narrative through what Samuel Taylor Coleridge first referred to as a *willing suspension of disbelief*. (Coleridge, 1817)

In conclusion, most of the questions raised when considering the adaptation of the case method for undergraduate use (Andrews and Williamson, 2008) are only determinable with a clear understanding of the specific nature and culture of the undergraduate target learner group. When developing effective case learning sessions for undergraduate students it is therefore critical to ensure the facilitator genuinely understands the learner group in order to plan with their preferred learning style (Honey and Mumford, 2001), developmental level (Hersey and Blanchard, 1969), and available time for preparation in mind.

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